



Change Investment Pool Options

Fund Name: _____
To modify your investment pool options, email the completed form to info@midlandscommunity.org.

Investment Options

We currently have three investment pools. Non-endowed funds may be invested in any one of these pools. Endowed funds must be invested in the Balanced Account Pool. You can request changing investment pools by submitting this form. The change will become effective on October 1 of the current year. Once you are invested, you **MUST** stay in the Investment Pool for one year before you can change. Please note, unless you request otherwise, your Fund will remain invested in the Balanced Account Pool.

_____ 100% The objective of the **Conservative Account** is designed to grow the aggregate value of the Fund at a real rate of return of 2.5% over a typical market cycle of 5-7 years. Inflation will be measured by the U.S. Department of Labor Consumer Price Index for All Urban Consumers.

<u>Type of Security</u>	<u>Target</u>	<u>Range</u>
Equity	20%	5-35%
Fixed Income	70%	55-85%
Alternatives	7%	0-20%
Cash Equivalent	3%	0-10%

_____ 100% The objective of the **Balanced Account** is designed to grow the aggregate value of the Fund at a real rate of return of 4% over a typical market cycle of 5-7 years. Inflation will be measured by the U.S. Department of Labor Consumer Price Index for All Urban Consumers.

<u>Type of Security</u>	<u>Target</u>	<u>Range</u>
Equity	45%	30-60%
Fixed Income	45%	30-60%
Alternatives	7%	0-20%
Cash Equivalent	3%	0-10%

_____ 100% The objective of the **Aggressive Account** is designed to grow the aggregate value of the Fund at a real rate of return of 5.5% over a typical market cycle of 5-7 years. Inflation will be measured by the U.S. Department of Labor Consumer Price Index for All Urban Consumers.

<u>Type of Security</u>	<u>Target</u>	<u>Range</u>
Equity	70%	55-85%
Fixed Income	20%	5-35%
Alternatives	7%	0-20%
Cash Equivalent	3%	0-10%

Signed: _____ Dated: _____